

**Figure 6-7
Household Type in Howard County**

Category	1990		2010		1990 to 2010	
	Number	Percent	Number	Percent	Growth	% Increase
Family Households	50,691	74.2%	76,333	72.9%	25,642	50.6%
With children under 18	26,442	38.7%	38,764	37.0%	12,322	46.6%
With no children under 18	24,249	35.5%	37,569	35.9%	13,320	54.9%
Nonfamily households	17,646	25.8%	28,416	27.1%	10,770	61.0%
Householder living alone	13,088	19.2%	22,903	21.9%	9,815	75.0%
Householder 65 years and older	2,664	3.9%	6,754	6.4%	4,090	153.5%
Total Households	68,337	100.0%	104,749	100.0%	36,412	53.3%

Source: U.S. Census

Location of Future Residential Development

Current Residential Development Capacity

Figure 6-8 provides information on the location and mix of existing residential development, as well as future capacity for additional development under current zoning. Map 6-1 shows the locations of each of the planning areas referred to in the chart. *General Plan 2000* policies and County zoning limit development in the Rural West and direct growth into more compact development patterns in the East, primarily along the Route 1 Corridor and in Downtown Columbia, but also in the Route 40 corridor and potentially Columbia's older Village Centers. The result is a total current capacity of 141,000 housing units, which would be an increase of an additional 34,000 units over the built total in 2010 of 107,000, if all the potential units are eventually built. Due to the stable zoning and land preservation goals being met, the capacity in the Rural West portion of the County has remained about the same at a total of 17,750 units.



Single-family detached homes form the dominant development pattern in parts of the County.

Figure 6-8 also shows existing units, permitted units (those under construction), recorded unbuilt lots, in-process units (those with a subdivision or site plan under review), and undeveloped units. About 45% of the additional 34,000 units allowed under current zoning are either in-process, recorded but unbuilt, or permitted. Consequently, the exact location and type of these units is already determined. They include a significant number of larger phased plans in the Route 1 Corridor. Note that many of these in-process units have been delayed over the past three to four years due to the recent economic downturn. Including the 5,500 Downtown Columbia units (which are counted in the undeveloped category), more than 60% of future housing units are known in detail, including location, type, and likely phasing.

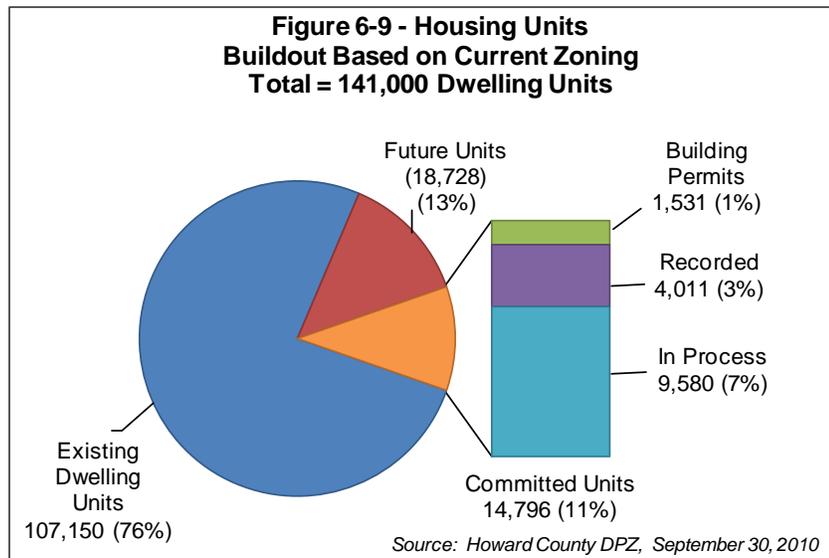
Over the past two decades, 55% of all new homes built were single-family detached and 45% were townhouses, condominiums, or apartments. Based on current zoning, only 33% of future new homes will be single-family detached and 67% will be townhouses, condominiums, or apartments (Figure 6-9).

**Figure 6-8
Residential Unit Distribution by Stage and Type in Howard County**

		SFD	SFA	APT	MH	Total	Percent
Columbia	Existing	15,905	10,835	13,098	0	39,838	83.8%
	Permit	17	9	374	0	400	0.8%
	Unbuilt	123	57	18	0	198	0.4%
	In-Process	46	151	132	0	329	0.7%
	Undeveloped	212	42	6,509	0	6,763	14.2%
	Total	16,303	11,094	20,131	0	47,528	100.0%
Ellicott City	Existing	14,560	3,744	5,873	0	24,177	80.7%
	Permit	50	28	162	0	240	0.8%
	Unbuilt	379	53	58	0	490	1.6%
	In-Process	623	740	1,225	0	2,588	8.6%
	Undeveloped	1,451	632	368	0	2,451	8.2%
	Total	17,063	5,197	7,686	0	29,946	100.0%
Elkridge	Existing	6,879	3,345	3,650	854	14,728	65.6%
	Permit	67	30	32	0	129	0.6%
	Unbuilt	365	292	75	1	733	3.3%
	In-Process	374	1,063	1,965	0	3,402	15.2%
	Undeveloped	752	446	2,253	0	3,451	15.4%
	Total	8,437	5,176	7,975	855	22,443	100.0%
Southeast	Existing	6,952	4,886	2,595	441	14,874	63.7%
	Permit	45	151	433	4	633	2.7%
	Unbuilt	427	331	166	15	939	4.0%
	In-Process	662	436	1,623	4	2,725	11.7%
	Undeveloped	1,413	1,267	1,481	0	4,161	17.8%
	Total	9,499	7,071	6,298	464	23,332	100.0%
Rural West	Existing	13,375	149	5	3	13,532	76.2%
	Permit	121	8	0	0	129	0.7%
	Unbuilt	1,645	6	0	0	1,651	9.3%
	In-Process	536	0	0	0	536	3.0%
	Undeveloped	1,902	0	0	0	1,902	10.7%
	Total	17,579	163	5	3	17,750	100.0%
Countywide	Existing	57,671	22,959	25,221	1,298	107,149	76.0%
	Permit	300	226	1,001	4	1,531	1.1%
	Unbuilt	2,939	739	317	16	4,011	2.8%
	In-Process	2,241	2,390	4,945	4	9,580	6.8%
	Undeveloped	5,730	2,387	10,611	0	18,728	13.3%
	Total	68,881	28,701	42,095	1,322	140,999	100.0%

Note: Existing acres as of Sept. 30, 2010 & In-Process Acres as of end of Nov. 2010

Source: Howard County DPZ Land Use Database



Expansion of the Planned Service Area

Expansions to the Planned Service Area (PSA) *for water and sewer service* since 1990 have been very limited. In 1993, the County Council voted to extend water service to include the area around the Alpha Ridge Landfill. This extension was done solely out of concern for potential future groundwater contamination that might originate from the Alpha Ridge Landfill; therefore, only water service is provided in this area. No sewer service is allowed and no change from rural land uses or zoning is authorized. Map 6-1 shows the current boundary for public water and sewer as well as the water-service-only area.

The boundary of the PSA for both water and sewer service is important not only to determine which parcels will be served by public water and sewer service, but also because the PSA is Howard County's designated growth boundary or Priority Funding Area per the State's Smart Growth Act. The PFA/PSA is also the boundary for *PlanHoward 2030's* rural place designations. As such, adjustments to the PSA would have significant ramifications in terms of both permitted development intensity and the level of other County and State services.

PlanHoward 2030 proposes three minor expansions of the Planned Service Area (adjoining Ellicott City, Clarksville, and Maple Lawn). To achieve Bay restoration goals it is preferable to include these properties in the PSA, rather than have them utilize septic systems particularly where the area drains to reservoirs or high quality stream systems. These properties, because of their location at the interface of the rural residential zone and the planned service area, should be designed and zoned to establish a transition that is compatible with and enhances surrounding communities. In addition, they should create an environmental benefit through environmental site design that mitigates impervious surfaces so that storm water will be captured onsite and not affect nearby waterways.

In the future, it should be anticipated that there may be isolated situations where minor PSA adjustments may be appropriate. A PSA revision requires a General Plan Amendment to Map 6-2. Any requests for a General Plan Amendment for expansion of the PSA should be denied unless either:

- 1) The proposed expansion of the Planned Service Area is intended to provide for a public or institutional use such as a religious facility, philanthropic institution, or academic school; or
- 2) The proposed expansion of the Planned Service Area includes a zoning proposal that is consistent with the General Plan and Smart Growth policies. Sewer and water infrastructure capacity and costs must be analyzed to confirm the feasibility and availability of scheduled capacity.

As established in *General Plan 2000* and subsequent amendments, institutional or public use expansions of the Planned Service Area boundary are limited to:

- 1) Properties adjoining the existing PSA boundary without including an intervening privately owned parcel;
- 2) The minimum area necessary to serve the proposed use. Subdivision of the parcel consistent with the PSA boundary amendment is required after approval of the General Plan amendment and prior to the inclusion of the parcel into the Metropolitan District; and
- 3) The particular use proposed at the time of expansion, with a deadline



for the completion of the improvements for the proposed use and connection to the public water and/or sewerage system. If the proposed public or institutional use is not actually constructed and connected to the public water and/or sewerage system by the deadline specified in the Bill, the Planned Service Area expansion shall be null and void and the Planned Service Area automatically shall revert to its location prior to the Council Bill approving the expansion.

Designated Place Types – Future Residential Development

As indicated at the beginning of this chapter, *PlanMaryland* asks local jurisdictions to refine their Priority Funding Areas (PFA) by identifying more focused target areas for future growth. These include three designated place types within the PFA: Targeted Growth and Revitalization areas, Established Community areas, and Future Growth areas. The Future Growth area is not proposed for Howard County as this place type applies to large areas of rural land outside the PFA/PSA that are planned for extension of public water and sewer service in the future. An example of this would be a Maryland county that has municipalities with future annexation potential. The other two place types are for rural areas outside the PFA: Low Density Development areas and Rural Resource areas where agricultural land preservation has priority, which are combined on Map 6-2 “Designated Place Types” as the “Rural West until the Sustainable Growth and Agricultural Preservation Act Growth Tiers are established in the Fall of 2012”. These correspond to the County’s RR (Rural Residential) and RC (Rural Conservation) zoning districts. *PlanMaryland* place designations are intended both to decrease sprawl via compact development and to focus local and State resources to support smart growth. Map 6-2 designates the relevant ~~four~~ place types for Howard County.

Map 6-2 also shows the five planning areas that were introduced and have been utilized since the adoption of *General Plan 2000* (also shown in Map 6-1). These five planning areas will continue to be used for some development tracking and statistical purposes, coordination with other County master plans such as the Howard County Land Preservation, Recreation and Parks Plan, and potential small area planning efforts.

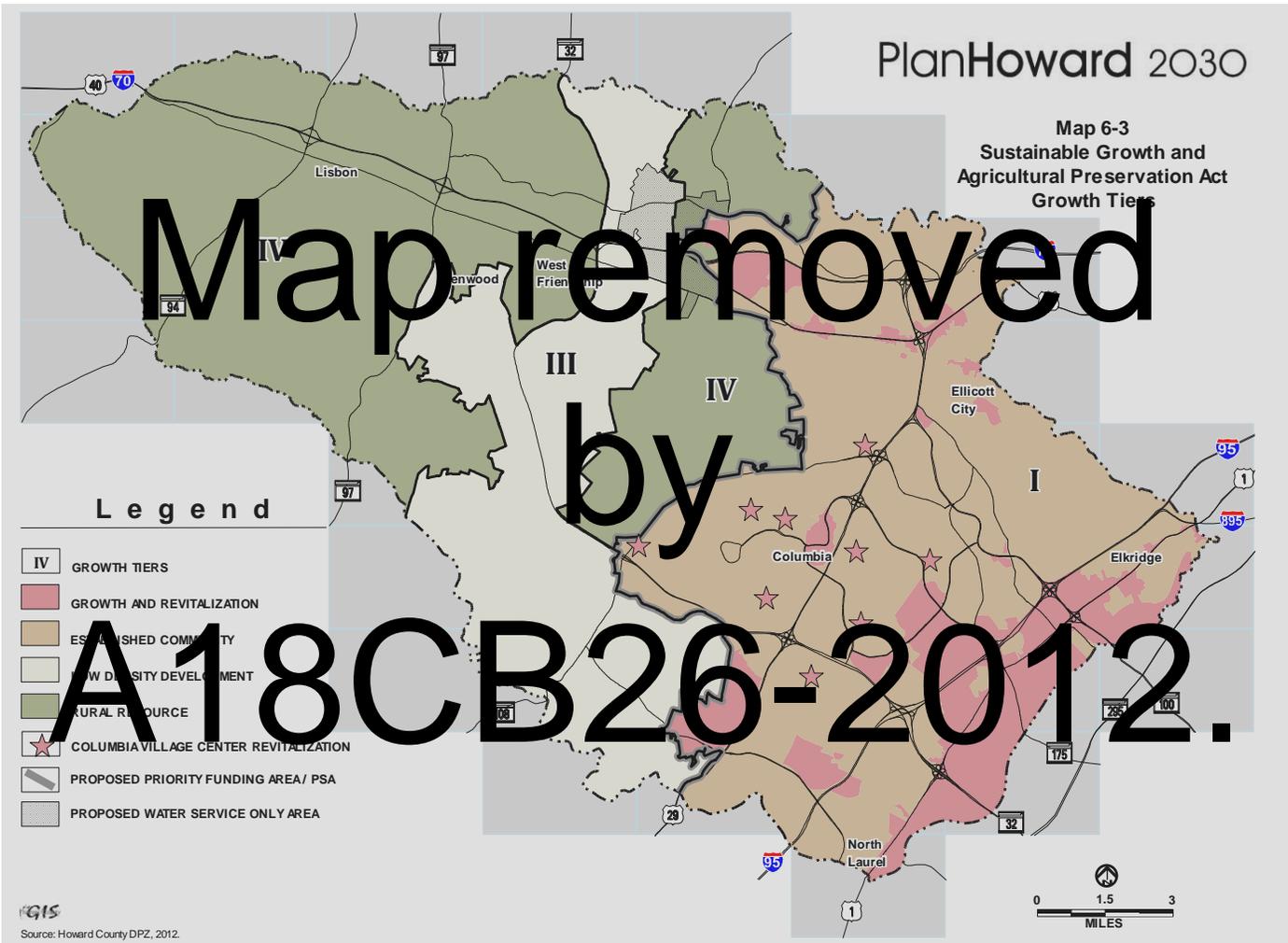
~~Sustainable Growth and Agricultural Preservation Act of 2012~~

~~New restrictions on the development of major subdivisions using septic systems in rural areas were adopted by the Maryland General Assembly in April 2012 through the Sustainable Growth and Agricultural Preservation Act (Senate Bill 236). This Act requires local jurisdictions to classify land into one of four “Growth Tiers” based on the following:~~

- ~~▪ **Tier I** – designated growth area served by public sewer;~~
- ~~▪ **Tier II** – designated for future extension of public sewer service;~~
- ~~▪ **Tier III** – not planned for sewer service, not dominated by agricultural or forest, and planned for large lot development with septic systems;~~
- ~~▪ **Tier IV** – not planned for sewer service, dominated by agricultural and forest land planned for resource protection.~~

~~The intent of this legislation is to prohibit major subdivisions or five or more lots in Tier IV areas. Local jurisdictions must adopt tier designations by December 31, 2012 or all areas not served by public sewer will be restricted to minor subdivisions of four or fewer lots. Map 6-3 shows the Growth Tiers for Howard County. Tier I is our Priority Funding Area, which is the Planned Public Water and Sewer Service Area. No areas are designated for Tier II, since there are no plans for further extension of the Public Water and Sewer Service Area in the future. Tier III equates to the RR zoning district and Tier IV is the RC zoning district. The purpose statements in these two zoning districts clearly reflect the planning objectives for these two tiers.~~

~~Two amendments were adopted to this State law to moderate the impact of prohibiting new major subdivisions in Tier IV. One is to “grandfather” any subdivision rights that were specifically retained in an agricultural, environmental,~~



or historic preservation easement for a particular property. The other is an allowance for the possibility of density transfer of development rights from Tier IV properties. Howard County's DEO (Density Exchange Option) zoning district

Effective on (_____)

currently allows for density transfer under certain conditions. The density transfer provisions in the DEO district should be reviewed and updated to reflect SB 236 during the Comprehensive Zoning process.

Amount & Phasing of Future Residential Development

Howard County adopted Adequate Public Facility (APF) Regulations in 1992 in response to growth that exceeded 4,000 new homes per year in the late 1980s. The APF regulations control the pace of residential development and ensure the adequacy of school and road capacity in relation to growth. The pace of residential growth is set by the General Plan and controlled by a system of annual housing allocations that limit the amount of new residential development that is allowed to be processed through the plan review process each year. The APF Housing Allocation chart, which controls how allocations are distributed geographically to achieve General Plan policies, is adopted annually by the County Council. Currently allocations are distributed among the five planning

**Figure 6-10
Howard County APFO Allocations Chart**

Year	Downtown Columbia	Growth and Revitalization	Established Communities	Green Neighborhood	Rural West	Total County
2015	400	1,200	400	150	100	2,250
2016	350	1,200	400	150	100	2,200
2017	300	1,200	400	150	100	2,150
2018	100	1,200	400	150	100	1,950
2019	100	1,200	400	150	100	1,950
2020	96	1,200	400	150	100	1,946
2021	400	1,200	400	150	100	2,250
2022	350	1,200	400	150	100	2,200
2023	300	1,200	400	150	100	2,150
2024	225	1,200	400	150	100	2,075
2025	200	1,200	400	150	100	2,050
2026	200	1,200	400	150	100	2,050
2027	200	1,200	400	150	100	2,050
2028	179	1,200	400	150	100	2,029
2029	175	1,200	400	150	100	2,025
2030	175	1,200	400	150	100	2,025
20-Year Totals	3,750	19,200	6,400	2,400	1,600	33,350

Source: Howard County DPZ

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areas shown on Maps 6-1 and 6-2 with additional pools of allocations for senior housing, moderate income housing, Route 1, Downtown, and Green Neighborhoods.

PlanHoward 2030 proposes to simplify allocation distribution. Figure 6-10 shows how APF Housing allocations will be used to pace growth through 2030. Only five allocation pools are proposed: Downtown Columbia; Targeted Growth and Revitalization; Established Communities; Green Neighborhood; and the Rural West. The Downtown Columbia, Targeted Growth and Revitalization, Established Communities, and Rural West areas are shown on Map 6-2. Green Neighborhood allocations can be granted anywhere in the PFA for development meeting green neighborhood design standards. Allocations are granted at the initial planning stage when sketch or preliminary plans are first reviewed by DPZ. Since it typically takes several years from initial plans to the construction and occupancy of all units in a project, allocations are granted three years in the future per the APF law. The first allocation year in Figure 6-10 is thus 2015, three years after the 2012 adoption year of *PlanHoward 2030*.

- **Downtown Columbia.** These allocations are based on the Downtown Columbia Plan adopted in 2010. The annualized pace of growth shown in Figure 6-10 is based on the current housing unit allocation chart adopted by the County Council. Over the 16-year allocation period from 2015 through 2030, 3,750 Downtown Columbia allocations are available. Including the 950 allocations that were made available in the 2013 and 2014 allocation years in previous allocation charts, a total of 4,700 of the 5,500 ultimate approved Downtown units will be allocated, reflecting the maximum units allowed in the first two of the three total growth phases in the Downtown Plan.
- **Targeted Growth and Revitalization.** These areas are defined on Map 6-2 and include the Route 1 Corridor, the Snowden River Parkway area, Maple Lawn, Emerson, Turf Valley, Waverly Woods, Columbia Village Centers, nodes along the Route 40 Corridor, and other locations. These are areas where current policies, zoning, and other regulations, as well

as policies suggested in *PlanHoward 2030*, seek to focus most future County growth. Allocations for the entire Targeted Growth and Revitalization area are set at 1,200 housing units per year.

- **Established Communities.** These areas are also defined on Map 6-2 and consist of already established residential and commercial areas in the eastern portion of the County where limited growth is expected, primarily through residential infill development. This entire area is much larger than the entire Targeted Growth and Revitalization area, but has much less growth capacity and at 400 units per year contains only a third of the phased growth compared to the Targeted Growth and Revitalization area.
- **Green Neighborhood.** This category replicates the Green Neighborhood set-aside in the currently adopted APF allocation chart. This set-aside was first added to the allocation chart in 2007. These units can be built anywhere in the County if the proposed plans meet Green Neighborhood standards as defined in the Howard County Subdivision and Land Development Regulations. The current APF chart includes 100 Green Neighborhood allocations per year. *PlanHoward 2030* increases the annual number to 150 with the goal of promoting more green development in Howard County.
- **Rural West.** This area is outside of the Priority Funding Area, is not served by public water and sewer, ~~and includes both the Low Density Development and Rural Resource designated place types.~~ The current APF chart includes 150 Rural West allocations per year. *PlanHoward 2030* decreases the annual number to 100, slowing future development in the West through 2030. There are, however, currently a significant number of grandfathered lots.

The total annual pace in Figure 6-10 for all areas combined is based on the current adopted APF allocation totals through 2020, with the same pace extended through 2030. Development has slowed due to the recession that began at the end of 2008, but it is expected that as the economy picks up over the next several years the housing market will return to more typical levels. The APF allocation chart based on Figure 6-10 allows for renewed development opportunities, while still capping growth so that it will not exceed current housing allocation levels. The APF schools test will continue to prevent development in areas of school overcrowding.

As noted above, Figure 6-10 does not include the Senior East, Route 1 and MIHU allocation set-asides, nor the Columbia, Elkridge, Ellicott City, and Southeast Planning areas that are included in the current APF chart, thus reducing the number of allocation pools from ten to five. Age-restricted units and moderate income housing units can continue to be built, but rather than having their own allocation pool, they will utilize allocations from the areas in the new APF chart. The new chart simplifies APF and better targets future development to intended targeted growth and revitalization areas.

As stated earlier, a lot of future development will consist of higher density projects. Numerous allocation categories with small numbers of allocations have not worked well for larger multifamily or mixed-use projects. Project design, financing, and market flexibility will be better supported by having larger numbers of allocations available in fewer areas, while retaining the same overall residential development cap.

Policies and Implementing Actions

POLICY 6.1 – Maintain adequate facilities and services to accommodate growth.

Implementing Actions

- a. ~~Place Types and Tiers.~~ Obtain State concurrence on *PlanHoward 2030* place designations and tiers in accordance with *PlanMaryland's* final criteria and procedures and the Sustainable Growth and Agricultural Preservation Act on or before December 31, 2012. **Limited Planned Service Area Expansion.** Zoning requirements for approved PSA expansions should include a development proposal that is consistent with the General Plan and establishes a transition that is compatible with and enhances surrounding communities and provides an environmental benefit.
- b. ~~Revise APF Regulations.~~ Amend the current Adequate Public Facilities regulations to reduce allocation categories and reflect designated places. **Place Types and Tiers.** Obtain State concurrence on *PlanHoward 2030* place designations and tiers in accordance with *PlanMaryland's* final criteria and procedures and the Sustainable Growth and Agricultural Preservation Act on or before December 31, 2012.
- c. ~~APF Housing Allocations.~~ Incorporate the *PlanHoward 2030* housing forecasts into the Adequate Public Facilities Housing Allocation Chart. **Revise APF Regulations.** Amend the current Adequate Public Facilities regulations to reduce allocation categories and reflect designated places.
- d. ~~Zoning.~~ Reduce competition for land resources by promoting more compact development in appropriate targeted growth and revitalization areas. **APF Housing Allocations.** Incorporate the *PlanHoward 2030* housing forecasts into the Adequate Public Facilities Housing Allocation Chart.
- e. ~~Density Exchange Option.~~ Review and, as appropriate, amend the density exchange provisions of the DEO zoning district during the Comprehensive Zoning process to help mitigate subdivision restrictions placed on Tier IV properties. **Zoning.** Reduce competition for land resources by promoting more compact development in appropriate targeted growth and revitalization areas.
- f. ~~Targeted Funding.~~ Optimize the use of State and County infrastructure funding and program resources targeted to County-designated place types. **Density Exchange Option.** Review and, as appropriate, amend the density exchange provisions of the DEO zoning district during the Comprehensive Zoning process to help mitigate subdivision restrictions placed on Tier IV properties .
- g. ~~Schools.~~ Make efficient use of existing school capacity avoiding unnecessary capital outlays. **Targeted Funding.** Optimize the use of State and County infrastructure funding and program resources targeted to County-designated place types.
- h. ~~Schools.~~ Make efficient use of existing school capacity avoiding unnecessary capital outlays.

POLICY 6.2 – Ensure that the County's needs for land for government facilities and land preservation are met in light of competing needs for housing and economic development.

Implementing Actions

- a. **Infrastructure Concurrency.** Determine the amount and location of land needed for future schools and other facilities, including park and green infrastructure preservation priorities.
- b. **Capital Improvements Master Plan.** Implement land acquisition priorities and funding via the ten-year Capital Improvement Master Plan.
- c. **Connectivity.** Ensure that planning for government and public school facilities should incorporate consideration of transportation connectivity and access for pedestrians, bicyclists, and individuals with disabilities.

Nonresidential Growth and Development

Job Growth

Job growth in Howard County has been robust over the past two decades. In 1990, there were 106,000 jobs in the County. By 2009, the total increased to 187,000 jobs. This is an average growth of about 4,280 new jobs per year over the 19-year period. This time period includes three recessions – 1990/91, 2001, and 2008/09. Despite these recessionary periods, Howard County only lost jobs during the most recent recession, known as the “great recession,” when there was a 2,300 job decline between 2008 and 2009. Job growth remained basically flat in Howard County as a result of the other two recessions. From 2000 to 2009, Howard gained 27,900 new jobs, an 18% increase. This ranks Howard fifth in Central Maryland in absolute job growth for this most recent nine-year period, following Anne Arundel, Baltimore, Montgomery, and Prince George’s Counties, respectively. Baltimore City has experienced job declines over the last two decades. Figure 6-11 summarizes this historical job growth.

Significant job increases that have occurred over the past 20 years necessitate new nonresidential development. Figure 6-12 summarizes the total nonresidential rentable building area by building type for jurisdictions in the Baltimore region as of 2010. About 15%, or 71 million of the total 485 million square feet, is located in Howard County. Baltimore County, Baltimore City, and Anne Arundel County have the greatest amount of total space, respectively.

**Figure 6-11
Central Maryland Employment (1,000s)**

Jurisdiction	1990		2000		2009	
	Jobs	Percent	Jobs	Percent	Jobs	Percent
Anne Arundel County	250.1	11%	295.2	11%	357.0	13%
Baltimore County	399.5	17%	448.5	17%	505.6	18%
Carroll County	52.4	2%	68.1	3%	82.0	3%
Harford County	75.1	3%	97.1	4%	114.9	4%
Howard County	105.8	5%	159.2	6%	187.1	7%
Baltimore City	508.5	22%	446.4	17%	384.8	14%
Frederick County	72.3	3%	103.9	4%	127.3	4%
Montgomery County	512.6	22%	593.0	23%	645.2	23%
Prince George's County	372.4	16%	391.2	15%	428.4	15%
TOTAL	2,348.6	100%	2,602.5	100%	2,832.4	100%

Source: U.S. Bureau of Economic Analysis, May 2011

**Figure 6-12
Baltimore Region Rentable Building Area by Type in 2010 (X 1,000 sq. ft.)**

Jurisdiction	Office Space		Flex Space		Industrial Space		Retail Space		Total Space	
	Area	Percent	Area	Percent	Area	Percent	Area	Percent	Area	Percent
Baltimore County	37,300	30%	17,200	35%	44,100	24%	44,400	35%	143,000	29%
Baltimore City	45,400	36%	5,700	12%	54,800	30%	27,100	21%	133,000	27%
Anne Arundel County	19,800	16%	11,000	22%	25,100	14%	27,000	21%	82,900	17%
Howard County	16,800	13%	11,500	23%	31,300	17%	11,000	9%	70,600	15%
Harford County	4,600	4%	2,700	6%	19,200	11%	11,500	9%	38,000	8%
Carroll County	2,100	2%	900	2%	7,900	4%	7,000	5%	17,900	4%
TOTAL	126,000	100%	49,000	100%	182,400	100%	128,000	100%	485,400	100%

Source: Howard County Economic Development Authority, 4th quarter 2010 data

General Plan 2000 set job growth targets of 4,000 new jobs per year between 2000 and 2010 and 3,000 jobs per year between 2010 and 2020. This was based on a rationale that the strong job growth of the mid- and late-1990s would continue for a while before slowing down into the next decade as undeveloped land became scarcer. Actual job growth between 2000 and 2009 averaged about 3,100 jobs per year, less than the 4,000 annual growth targets for this initial decade. However, considering that the two recessions that occurred since 2000 had not been anticipated, the County fared relatively well due to strong job growth in the middle of the last decade.

Capacity for Future Nonresidential Growth

In 2010 there was a total of 10,000 acres of developed commercial (office and retail), industrial, and institutional land. About 314 additional acres had signed site plans where construction was already under way or would begin soon. Another 227 acres were being reviewed for proposed future development. The remaining 1,351 acres with additional nonresidential capacity based on current zoning were undeveloped with no plans for them yet. This includes 614 commercially zoned acres and 737 industrially zoned acres. Figure 6-13 shows these acres, including their distribution in each planning area.

This nonresidential land use capacity can be translated into potential jobs based on zoning density. Based on current zoning, there is an estimated capacity for an additional 78,000 jobs in Howard County. This includes new jobs associated with the Downtown Columbia plan. The Downtown acreage for this is not included in Figure 6-14 since it is primarily a redevelopment or intensification project. With just over 11% of nonresidential land in Howard County undeveloped, much of the

**Figure 6-13
Nonresidential Acreage Distribution by Stage and Type in Howard County**

		Commercial	Industrial	Institutional	Total	Percent
Columbia	Existing	2,000	481	298	2,779	86.9%
	Signed	45	12	0	57	1.8%
	In-Process	45	18	0	63	2.0%
	Undeveloped	210	88	0	298	9.3%
	Total	2,301	599	298	3,197	100.0%
Ellicott City	Existing	588	49	301	938	82.5%
	Signed	37	4	0	41	3.6%
	In-Process	6	0	0	6	0.6%
	Undeveloped	128	24	0	152	13.4%
	Total	759	77	301	1,137	100.0%
Elkridge	Existing	566	1,124	372	2,061	79.7%
	Signed	25	34	0	58	2.3%
	In-Process	7	32	0	38	1.5%
	Undeveloped	63	364	0	427	16.5%
	Total	660	1,553	372	2,585	100.0%
Southeast	Existing	952	1,749	168	2,870	81.9%
	Signed	147	12	0	158	4.5%
	In-Process	76	0	0	76	2.2%
	Undeveloped	138	261	0	399	11.4%
	Total	1,313	2,021	168	3,502	100.0%
Rural West	Existing	406	45	992	1,443	92.4%
	Signed	0	0	0	0	0.0%
	In-Process	43	0	0	43	2.8%
	Undeveloped	74	0	0	75	4.8%
	Total	523	46	992	1,561	100.0%
Countywide	Existing	4,512	3,449	2,130	10,091	84.2%
	Signed	253	61	0	314	2.6%
	In-Process	177	49	0	227	1.9%
	Undeveloped	614	737	0	1,351	11.3%
	Total	5,556	4,296	2,130	11,982	100.0%

Note: Existing acres as of Sept. 30, 2010 & In-Process Acres as of end of Nov. 2010

Source: Howard County DPZ Land Use Database

future economic growth will occur through redevelopment or a more intensive use of existing properties.

**Figure 6-14
Howard County Employment Growth Targets**

Year	Job Increase	Total Jobs
2000		159,200
2010	29,900	189,100
2015	15,000	204,100
2020	15,000	219,100
2025	15,000	234,100
2030	15,000	249,100

Source: 2000 job total from U.S. BEA

2010 job estimate from MDP

Job Growth to 2030

Based on the average pace of job growth in Howard County of about 3,100 new jobs per year over the last decade, continuing to add 3,000 new jobs per year between 2010 and 2030 is a reasonable job target for this general plan. Figure 6-14 summarizes these projections.

Therefore, over the 20-year period a total of 60,000 new jobs are forecast. Based on the available nonresidential land in the County described above and future redevelopment and intensification projects such as Downtown Columbia, there is enough land capacity to accommodate these projected jobs. At this rate it is estimated that there will be about 249,000 jobs in the County by 2030. Howard County’s prime location between Baltimore and Washington is a natural attractor of new businesses which will lead to continued job growth.

Jobs / Housing Balance

Since job growth also depends on having the workforce to fill the jobs, a common measure of how growth has been balanced is the ratio of jobs to housing. Figure 6-15 summarizes the jobs to housing ratio in Howard County since 1990. The jobs to housing ratio has increased from 1.51 in 1990 to 1.78 in 2009. This is a result of continued job growth in the County even while there have been constraints on residential growth due to the County’s Adequate Public Facilities Act. Setting housing limits too low in relation to job growth and associated housing demand contributes to higher housing prices, forcing many Howard County workers to commute greater distances for affordable housing.

**Figure 6-15
Jobs to Housing Ratio in Howard County**

Year	Jobs	Households	Jobs/ Households
1990	105,800	70,000	1.51
2000	159,200	90,000	1.77
2009	187,100	105,000	1.78

Source: Jobs data - U.S. Bureau of Economic Analysis

Households - Howard County DPZ

(Data rounded to the nearest 100)

Howard County’s current jobs to housing ratio is similar to those in Montgomery and Anne Arundel Counties. In 2010 all three are essentially the same at 1.77, 1.79 and 1.80, respectively. These three counties all have significant numbers of

jobs given their centrality within the Baltimore-Washington area. By comparison, other jurisdictions in Central Maryland have smaller ratios. The average for Central Maryland is 1.58. Statewide the average is a slightly smaller 1.54 (Figure 6-16).

Figure 6-16
Jobs to Housing Ratio Comparisons - Central Maryland Jurisdictions

Jurisdiction	2000			2010 Estimates		
	Jobs	Households	Jobs/House.	Jobs	Households	Jobs/House.
Anne Arundel County	295,200	178,700	1.65	359,300	199,600	1.80
Montgomery County	593,000	324,600	1.83	645,000	360,500	1.79
Howard County	159,200	90,000	1.77	189,100	107,100	1.77
Baltimore County	448,500	299,900	1.50	503,200	319,900	1.57
Frederick County	103,900	70,000	1.48	128,200	83,700	1.53
Baltimore City	446,400	258,000	1.73	388,500	260,300	1.49
Prince George's County	391,200	286,600	1.36	423,600	307,500	1.38
Carroll County	68,100	52,500	1.30	81,900	60,600	1.35
Harford County	97,100	79,700	1.22	116,800	92,200	1.27
Central MD Region	2,602,600	1,640,000	1.59	2,835,600	1,791,400	1.58
State Total	3,065,200	1,980,900	1.55	3,359,800	2,181,800	1.54

Source: 2000 households from the U.S. Census (rounded), 2000 jobs from U.S. BEA.

2010 household and job estimates from Maryland Department of Planning, except HC households which are based on Howard County DPZ estimated (Data rounded to the nearest 100)

Looking forward to 2030, assuming all the future housing units in Figure 6-10 (plus actual units built in 2011 and forecasts through 2014) and 3,000 new jobs per year are attained, the jobs to housing ratio would fall to 1.68 from 1.77. The ratio for the 20-year growth increment is 1.45. Note that while these numbers are important for determining expected trends at the County level, and with the ultimate goal of achieving a good "balance" between jobs and housing, this ratio is really more appropriate as a regional measure, since residents live and work throughout the region (Figure 6-17).

Figure 6-17
Howard County Projected Jobs to Housing Ratio

Year	Jobs	Households	Jobs/House
2010	189,100	107,150	1.77
2020	219,100	127,700	1.72
2030	249,100	148,600	1.68
20 Year Growth	60,000	41,450	1.45

Source: Howard County DPZ

While a high jobs to housing ratio is generally considered desirable from a fiscal perspective, an important consideration is the ratio of County jobs actually held by County residents. This has a significant impact on both where income taxes are paid and on the amount of commuter traffic generated. In 1990, 36% of the County resident labor force worked in the County, 64% commuted to areas outside the County, and 56% of jobs in Howard County were filled by non-County residents. By 2000, 38% of the County resident labor force worked in the County and 62% commuted to areas outside the County. This is a positive trend with more Howard County residents working in the County. In 2000, 57% of jobs in Howard County were filled by non-County residents, a slight increase compared

to 1990. Chapter 7, Transportation, includes further discussion on the implications of regional workforce community patterns.

Fiscal Impacts

A fiscal impact study has been conducted as part of *PlanHoward 2030*. The fiscal study is provided as a supplement to this document and summarizes the fiscal impacts of various growth and market value scenarios. Overall, the study shows that future job and housing growth outlined in this plan pays for itself. That is, revenues such as property and income taxes from new development are enough to cover costs for public services. The study does show, however, that with property and income taxes making up about 90% of General Fund revenues, trends in market values should be watched closely. This is important particularly because the net fiscal margins from multifamily units, which will be built at a higher proportion in the future, are not as great as from single-family detached units. Trends in public school enrollments should also be closely watched given school costs account for about 60% of General Fund costs. Generally, multifamily units generate fewer school children, but if there are fewer single-family detached units built, student yields in these types of units could potentially rise.

The fiscal study also shows that the residential and nonresidential growth targets outlined in this plan achieve a good balance in the commercial-residential assessable base ratio maintaining existing levels. This relates to the importance of achieving an optimal jobs/housing balance as discussed earlier. Similar to the importance of having a diverse job base, maintaining a diverse tax base is healthy from a fiscal perspective to avoid too much reliance on a single land use type.

Policies and Implementing Actions

POLICY 6.3 – Use *PlanHoward 2030* job and housing forecasts to guide County, regional, and State agency decision making regarding infrastructure and services.

Implementing Actions

- a. Baltimore Metropolitan Council. Incorporate *PlanHoward 2030* housing, population, and job forecasts into the Baltimore Metropolitan Council's official regional forecasts.
- b. Monitoring. Monitor the amount, type, and location of actual housing, population, and job growth for comparison with *PlanHoward 2030* forecasts.

POLICY 6.4 – Ensure that the County continues to capture future job and business growth opportunities.

Implementing Actions

- a. Economic Development. Partner with the Economic Development Authority to develop County policies and programs to implement the County's Strategic Plan for Economic Development.
- b. Zoning Regulations. Update zoning and other regulations to address the evolving commercial and industrial markets and development trends.
- c. **Commercially and Industrially Zoned Properties.** Establish policies to protect and promote commercially and industrially zoned land for future job and business growth opportunities.

The Need for More Compact Development

Howard County is centrally located within the Baltimore-Washington corridor. With its highly educated workforce Howard County is poised for growth in business and professional services, biotechnology, the health sciences, and alternative energy opportunities. BRAC, cyber security, and related information sciences will also play a central role in the County's future.

The total Central Maryland population in 2000 was 4.38 million (Figure 6-18). This includes Anne Arundel, Baltimore, Baltimore City, Carroll, Harford, Howard, Frederick, Montgomery, and Prince George's Counties. Over the last ten years the total population has grown by 350,000, totaling 4.73 million by 2010. This represents a regional growth rate of 8% over the decade (Figure 6-19). Howard County represents about 11% of this total growth and with 287,000 residents; it is currently about 6% of the total regional population.

Based on projections from the Maryland Department of Planning, the state will grow by an additional 890,000 residents by 2030. The Central Maryland region is expected to accommodate 588,000 of these new residents. About 7% of that growth, 41,000 new residents, will occur in Howard County. By 2030 Howard County will be 6% of the total regional population, similar to its share in 2010.

Figure 6-18
Central Maryland and State Population 2000, 2010 and 2030

Jurisdiction	2000		2010		2030	
	Population	Percent	Population	Percent	Population	Percent
Anne Arundel County	489,656	11.2%	537,656	11.4%	574,300	10.8%
Baltimore County	754,292	17.2%	805,029	17.0%	857,000	16.1%
Carroll County	150,897	3.4%	167,134	3.5%	207,300	3.9%
Harford County	218,590	5.0%	244,826	5.2%	287,700	5.4%
Howard County	247,842	5.7%	287,085	6.1%	328,200	6.2%
Baltimore City	651,154	14.9%	620,961	13.1%	682,950	12.8%
Frederick County	195,277	4.5%	233,385	4.9%	328,550	6.2%
Montgomery County	873,341	19.9%	971,777	20.5%	1,125,000	21.1%
Prince George's County	801,515	18.3%	863,420	18.2%	928,300	17.5%
Central MD Region	4,382,564	100.0%	4,731,273	100.0%	5,319,300	100.0%
State Total	5,296,486		5,773,552		6,664,250	

Source: 2000 and 2010 from U.S. Census. 2030 from Maryland Department of Planning as of May, 2011

Figure 6-19
Central Maryland and State Population Growth

Jurisdiction	2000 to 2010		2010 to 2030	
	Population	% Increase	Population	% Increase
Anne Arundel County	48,000	9.8%	36,644	6.8%
Baltimore County	50,737	6.7%	51,971	6.5%
Carroll County	16,237	10.8%	40,166	24.0%
Harford County	26,236	12.0%	42,874	17.5%
Howard County	39,243	15.8%	41,115	14.3%
Baltimore City	(30,193)	-4.6%	61,989	10.0%
Frederick County	38,108	19.5%	95,165	40.8%
Montgomery County	98,436	11.3%	153,223	15.8%
Prince George's County	61,905	7.7%	64,880	7.5%
Central MD Region	348,709	8.0%	588,027	12.4%
State Total	649,418	9.0%	890,698	15.4%

Source: 2000 and 2010 from U.S. Census. 2030 from Maryland Department of Planning as of May, 2011

Smarter Growth

Under *General Plan 2000*, Howard County designated areas for increased compact, mixed-use development. These included planned new communities such as Maple Lawn, Emerson, Waverly, and Turf Valley, as well as the redevelopment of Downtown Columbia, Route 1, and Route 40. In 2004 comprehensive rezoning established mixed-use zones along the Route 1 Corridor. In 2008 the Route 40 Study resulted in a mixed-use overlay zone for that corridor. In 2010 the Downtown Columbia Plan established the strategy for mixed-use revitalization in the County's urban center. The earliest mixed-use zones in the Route 1 Corridor should now be reevaluated and revised, if necessary, based on experience gained over the last eight years. Because Howard County's population will continue to increase while the amount of land available for development in the Priority Funding Area will continue to decrease, more compact development will be needed to accommodate future growth.

Challenges and Opportunities

Current challenges for redevelopment that have been recognized, particularly along the Route 1 Corridor, include assembly of smaller parcels, business relocation, zoning impediments, land use incompatibility issues, higher costs of multifamily development with structured parking, and financing and infrastructure needs. These challenges need to be addressed to facilitate new growth and capitalize on redevelopment opportunities.

On the other hand, opportunities exist in select locations within both Existing Communities and Targeted Growth and Revitalization areas for well-designed, compact development that enhances the surrounding community. In both types of areas new development needs to be context sensitive so that it fits well into the surrounding area in terms of uses and design. More flexibility is needed within the Zoning Regulations to allow and promote context sensitive design rather than uniform approaches. Planned Unit Development (PUD) zoning allows for such flexibility and should be included as a zoning strategy during the Comprehensive Zoning process.

Policies and Implementing Actions

POLICY 6.5 – Plan compact, well designed, and complete communities through the Comprehensive Zoning process.

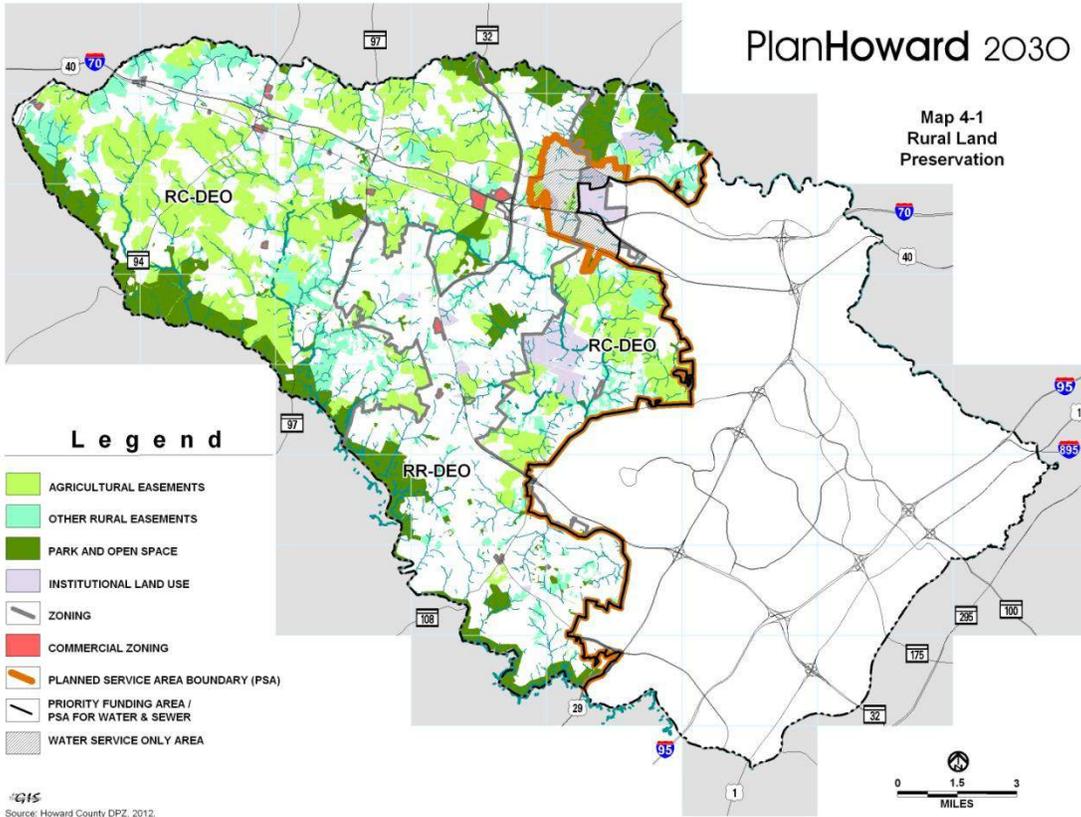
Implementing Actions

- a. Zoning Regulations. Revise the Zoning Regulations to better promote compact redevelopment and appropriate infill including consideration of connectivity and safe routes to school.
- b. Development Opportunities. Designate appropriate additional areas within the County's Priority Funding Area for well-designed, compact development in order to accommodate future job and housing growth.
- c. Planned Unit Development. Consider Planned Unit Development (PUD) zoning to allow increased flexibility for unique, well-designed, site-specific developments, which provide benefits and protections to surrounding communities.
- d. **Compact development.** Encourage compact development with adequate green spaces and connectivity within and between developments which provide residents with a high quality of life and

allows residents to take advantage of the benefits of the compact development.

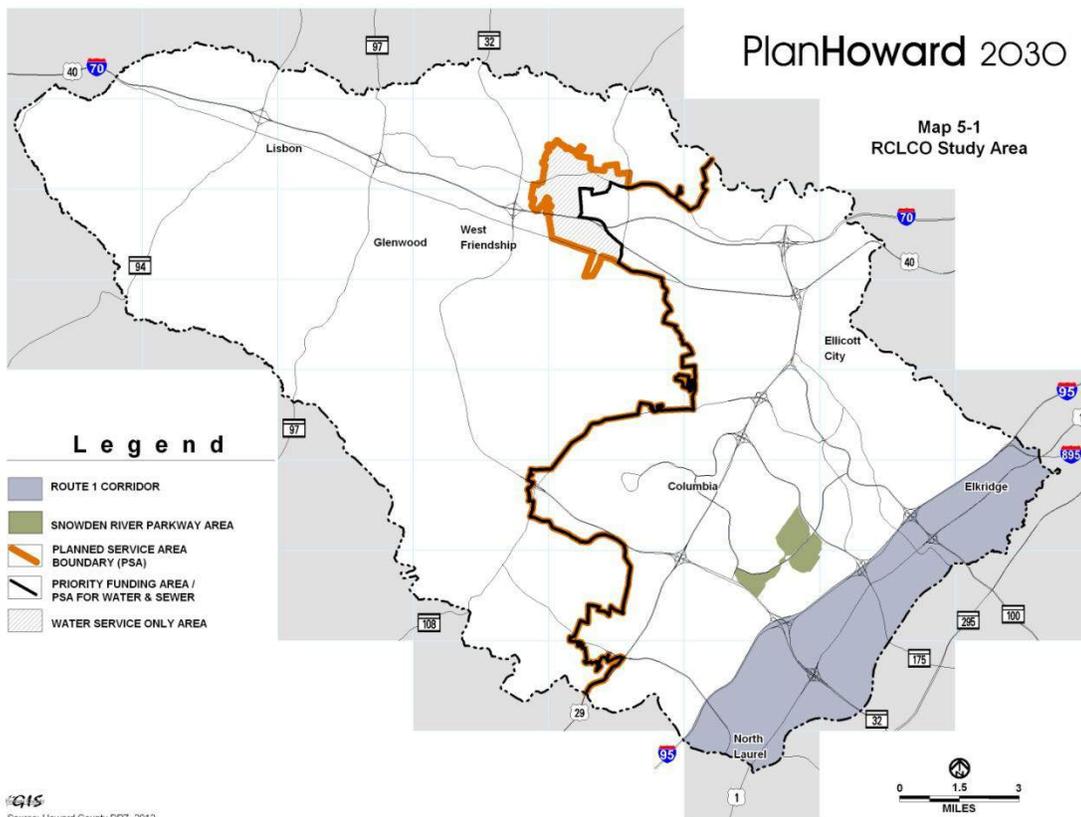
PlanHoward 2030

Map 4-1
Rural Land
Preservation



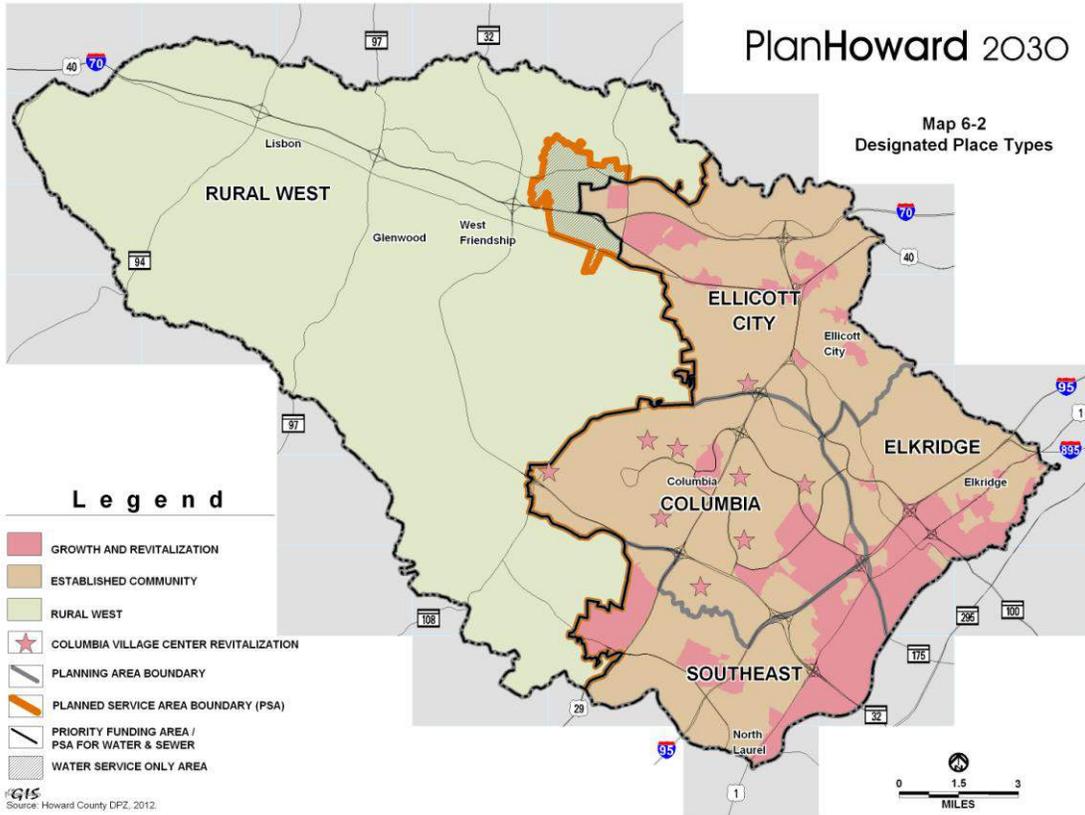
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Map 5-1
RCLCO Study Area



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Map 6-2
Designated Place Types



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Map 7-3
Functional Road Classification

